

# Global Dry Local Scrubber Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Dry Local Scrubber market size is expected to reach \$ 266 million by 2032, rising at a market growth of 6.5% CAGR during the forecast period (2026-2032).

Dry Local Scrubber is a waste gas treatment systems integrated downstream of process equipment. Through physical adsorption and chemical neutralization, they directly treat highly toxic, corrosive, or greenhouse gases without the involvement of liquids, ensuring that exhaust emissions meet environmental standards and guaranteeing production safety. Their core function is to achieve localized, real-time gas purification at the exhaust end of process equipment (such as etching machines and CVD systems), preventing pollutants from spreading into plant systems or the environment.

Semiconductor manufacturing processes are complex and highly dependent on equipment. Equipment performance directly impacts semiconductor manufacturing quality, process efficiency, and yield. Therefore, specialized semiconductor equipment is a leading and fundamental industry in the semiconductor sector, characterized by high technological barriers, long R&D cycles, high R&D investment, significant manufacturing difficulties, high equipment value, and high customer verification barriers. It represents one of the most challenging yet crucial links in the semiconductor industry. Dry local scrubber, as a core sub-category of semiconductor waste gas treatment, boasts advantages such as zero wastewater generation, adaptability to complex multi-component waste gases, and alignment with the high-cleanliness production requirements of semiconductor manufacturing. Driven by both increasingly stringent environmental policies and the expansion of the semiconductor industry, the market is experiencing steady growth, accelerated domestic substitution, and continuous technological upgrades.

Global main dry local scrubber players cover Ebara, Global Standard Technology, CS Clean Solution, Edwards Vacuum, CSK, Kanken Techno, GnBS Eco, etc. In terms of revenue, the global largest five manufacturers occupy a share nearly 70% in 2024. The

high-end market has long been dominated by international giants, companies with deep technological accumulation and a monopoly on advanced process equipment. They hold a dominant position in the high-end market through long-term cooperation with leading global semiconductor manufacturers. However, emerging Chinese companies such as Brother Microelectronics and PNC Process Systems are rapidly rising, gradually achieving domestic substitution in mature process areas. Competition in the industry is expected to intensify in the coming years, especially in the Chinese market. With increasingly stringent environmental requirements and the accelerated relocation of the semiconductor industry to mainland China, the field of semiconductor process waste gas treatment is attracting more and more manufacturers.

As environmental protection requirements become increasingly stringent and the pan-semiconductor industry accelerates its transfer to mainland China, the field of pan-semiconductor process waste gas treatment is attracting more and more companies to enter. Global regulations on waste gas emissions are becoming increasingly stringent. For example, the United States, Europe, and China have strict emission standards, and manufacturers must use efficient pollutant control equipment to meet these requirements.

The Asia-Pacific region is the world's largest and fastest-growing market. Mainland China, driven by its strategy of achieving self-sufficiency in semiconductors, has seen a surge in new wafer fab projects, becoming a core growth engine. Taiwan and South Korea, relying on industry leaders such as TSMC, Samsung, and SK Hynix, have stable equipment demand. Japan, with its domestic semiconductor manufacturing base and equipment manufacturers, has formed a complete domestic supply and demand system. Furthermore, Southeast Asia and India, with the relocation of the semiconductor industry, are gradually releasing equipment demand, becoming potential growth areas.

Semiconductor manufacturing requires a cleanroom environment, where even the smallest contaminants in the air can affect the production process and the quality of the final product. Semiconductor production often involves various chemical gases (such as fluorides, ammonia, chlorine, and silanes). Failure to treat these gases can cause significant harm to the environment and production facilities. Dry local scrubbers are designed to remove these harmful gases, ensuring a clean environment.

This report studies the global Dry Local Scrubber production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dry Local Scrubber and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Dry Local Scrubber that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Dry Local Scrubber total production and demand, 2021-2032, (Units)

Global Dry Local Scrubber total production value, 2021-2032, (USD Million)

Global Dry Local Scrubber production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Dry Local Scrubber consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Dry Local Scrubber domestic production, consumption, key domestic manufacturers and share

Global Dry Local Scrubber production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Dry Local Scrubber production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Dry Local Scrubber production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Dry Local Scrubber market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Ebara, Edwards Vacuum, CS Clean Solution, CSK(?????(?)), Global Standard Technology, Kanken Techno, GnBS Eco, UNISEM, Taiyo Nippon Sanso, KC Innovation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Dry Local Scrubber market

### Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Dry Local Scrubber Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Dry Local Scrubber Market, Segmentation by Type:

Single Column

Double Column

#### Global Dry Local Scrubber Market, Segmentation by Application:

CVD

Etching

Others

#### **Companies Profiled:**

Ebara

Edwards Vacuum

CS Clean Solution

CSK(?????(?))

Global Standard Technology

Kanken Techno

GnBS Eco

UNISEM

Taiyo Nippon Sanso

KC Innovation

Air Water Mechatronics

Triple Cores Technology

Integrated Plasma Inc (IPI)

Shanghai Brother Microelectronics Technology

PNC Process Systems

**Key Questions Answered:**

1. How big is the global Dry Local Scrubber market?
2. What is the demand of the global Dry Local Scrubber market?
3. What is the year over year growth of the global Dry Local Scrubber market?
4. What is the production and production value of the global Dry Local Scrubber market?
5. Who are the key producers in the global Dry Local Scrubber market?
6. What are the growth factors driving the market demand?

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